

Instructions for Copying a Plan in IDIS

1. Identify the year and version of the plan to copy. Use the search function to locate the plan prior to attempting the copy function, if there are numerous plan versions. In this example, the year is "2013" and the version is "Test Plan – All"
2. Next click "copy" in the Consolidated Plan module menu on the left of the screen.

The screenshot shows the IDIS web application interface. The top navigation bar includes the U.S. Department of Housing and Urban Development logo and the IDIS version 11.4.0_19733 (t219). The main header displays "Community Development Systems Integrated Disbursement & Information System (IDIS)".

On the left sidebar, the "Consolidated Plans" menu item is highlighted, and the "Copy" option is circled in red. The main content area shows a search results table for Consolidated Plans.

Search Criteria:

- Year: All Years (dropdown)
- Status: Select (dropdown)
- Buttons: Search, Reset

Results Page 1 of 1

Grantee Name	State	Year	Version	Title	Status	Action
BUFFALO	NY	2012	Test MA-15	Test MA-15 11/14/12	Open - in Progress	Edit View
BUFFALO	NY	2012	11-27-12	Check MSTR Errors 11-27-12	Open - in Progress	Edit View
BUFFALO	NY	2018	2018	City of Buffalo 2018-2022 Consolidated Plan	Open - in Progress	Edit View
BUFFALO	NY	2013	Test Plan - All	Test Plan	Open - in Progress	Edit View
BUFFALO	NY	2013	2013	City of Buffalo 2013-2017 Consolidated Plan	Open - in Progress	Edit View
BUFFALO	NY	2012	Test Plan	Test Plan - CDBG Only	Open - in Progress	Edit View
BUFFALO	NY	2015	Entitlement Copy Tes	ConPlan Copy	Open - in Progress	Edit View
BUFFALO	NY	2014	Test Plan - CDBG + H	Test Plan - CDBG + HOME	Open - in Progress	Edit View

3. Enter the start year and version name of the source plan being copied and the start year, end year and version name for the new plan. Indicate whether the copy is a substantial amendment, using the drop-down menu. Then click the copy button.

Note that the version name cannot be changed once the copy is created. Also, for a substantial amendment, the start year of the copy must be the same as the source plan.

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
Community Development Systems
Integrated Disbursement & Information System (IDIS)

UDIS version 11.4.0_19733 (t219)

User ID: H44760
User Role: Grantee
Organization: BUFFALO
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You have 32 CDBG and 18 HOME activities that have been flagged.

Consolidated Plans
Copy Consolidated Plan

[Copy](#) | [Cancel](#)

Source Consolidated Plan's Start Year:* 2013
Source Consolidated Plan's Version:* Test Plan - All

New Consolidated Plan's Start Year:* 2017
New Consolidated Plan's End Year:* 2021
New Consolidated Plan's Version:* Test Copy

If Amendment: *
N/A
N/A
Minor
Substantial

[Copy](#) | [Cancel](#)

- After clicking "copy," the system will return to the list of plans. Look up the plan with the year and version entered for the "New Consolidated Plan's Start Year" and the "New Consolidated Plan's Version."

Note that all new Con Plan copies will have the title "ConPlan Copy"

- Click "edit" to open and edit the plan copy. All data from your source plan should appear in the copy. If the plan is a substantial amendment, the data in each data table will copy from the source plan. A copy that is not a substantial amendment will be populated with the most up to date data.
- The title can be changed from "ConPlan Copy" on AD-25.

Community Development Systems
Integrated Disbursement & Information System (IDIS)

User ID: H44760
User Role:
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Organization:
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Consolidated Plans

Search

Search Criteria

Year:

All Years

Search | Reset

All Con Plan copies will have the title "ConPlan Copy" until the title is changed on AD-25

Results Page 1 of 1

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BUFFALO	NY	2012	Test MA-15	Test MA-15 11/14/12	Open - in Progress	Edit View
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BUFFALO	NY	2017	Test Copy	ConPlan Copy	Open - in Progress	Edit View
BUFFALO	NY	2013	Test Plan - All	Test Plan	Open - in Progress	Edit View
BUFFALO	NY	2013	2013	City of Buffalo 2013-2017 Consolidated Plan	Open - in Progress	Edit View
BUFFALO	NY	2012	Test Plan	Test Plan - CDBG Only	Open - in Progress	Edit View
BUFFALO	NY	2015	Entitlement Copy Tes	ConPlan Copy	Open - in Progress	Edit View
BUFFALO	NY	2014	Test Plan - CDBG + H	Test Plan - CDBG + HOME	Open - in Progress	Edit View

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Consolidated Plans

AD-25 Administration of the Consolidated Plan

[Save and Return](#) | [Cancel](#)

Strategic Plan Beginning Year: 2017

Ending Year: 2021

Title: Plan Version: If Amendment:

If Substantial Amendment, explain:

Programs included:

- ☒ CDBG
☒ HOME
☒ ESG
☒ HOPWA

Plan version cannot be edited after the plan is created; only the title can be changed

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